



CREATING A  
SELF-GUIDED

**SALES**

**FUNNEL**

A WHITE PAPER

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# 1

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## Creating a Self-Guided Sales Funnel

## Executive Summary

Sales are more than just transactions; they involve a journey of decision. Push too hard, and prospects will run. Keep it too casual, and they put off making decisions. What is the ideal balance? Creating a sales funnel or content path for prospects to follow can engage people through every stage of their customer journey.

People can't buy from you if they don't know you exist, and they won't buy from you if they don't trust you. In this white paper, we'll outline the stages of a customer journey and give you tips on guiding your prospects and customers from a posture of spectating to the point of final sale. You'll examine the five stages of a sales funnel, explore a four-step process for building your funnel, and learn from real-life examples of funnel marketing tools.


Sales funnels can be easy to create, launch, and measure. Now you can build your confidence in this process and grow valuable relationships with profitable results!



## Directing Your Customer's Journey

As a map is to a road trip, a sales funnel is a guide for the journey you want your customers to take. A sales funnel is the entire sales process you use to convert prospects to paying customers, including all the marketing, advertising, and communicating you do in the process.

Before constructing your sales funnel, it's important to note that there is no "one size fits all" funnel that you can duplicate. Every industry has a different audience, sales cycle, and definition of success. Ultimately, the funnel is a concept that will allow you to be more intentional in your communication while giving prospects space to make their own decisions.



A sale is merely a fruit that grows out of the seeds you've sowed in a relationship. People CAN'T buy from you if they don't know you exist, and they WON'T buy from you if they don't trust you.

### Building Value-Based Relationships

Business is about relationships and just like in your personal life, you can't have relationships with all people. In business, you're not marketing to EVERYBODY, but to those who are a good fit for what you sell. A sales funnel can help you funnel out the wrong customers and leave you with a stronger pool of potential partners.

A sales funnel will also help you be more intentional in your connections with people. The goal of marketing is not to make sales, but to build value-based relationships. And relationships bring results: ultimately, a sale is a person's "vote of confidence" that they trust you to solve their problem or believe you can help them reach their goal.

## A Five-Stage Sales Funnel

The symbol of a funnel captures a fundamental principle of marketing: qualifying your leads. To be successful in reaching your goals, you'll need a larger pool of leads than those who will eventually become prospects or customers. While some people will progress in their customer journey, your marketing will also "funnel out" others who aren't a good fit. As prospects browse, gather information, and experiment, they will either grow in confidence or decide to look elsewhere. Not everyone will buy from you. That's normal. But here's the good news: you can influence how many people reach the bottom of your funnel! As you optimize communication, you will gently guide more people toward conversion and long-term loyalty.

Here are five stages of a customer's potential journey:

### ✓ 1. Awareness

In this step, prospects learn about your existence. Just like dating, before you can introduce yourself to someone, you need to catch their eye. As you consider this stage of communication, ask yourself, "what will drive traffic in our direction? What will spark curiosity or attract interest?" Combining excellent print and digital marketing will put a memorable face on your business.

### ✓ 2. Interest

Now that you have their attention be sure to keep it! Here, prospects move beyond general awareness to intentional engagement. Like a prolonged, thoughtful gaze, a prospect begins to "check you out." At this stage, ask yourself "what will engage them enough that they won't drift away?" Seek to grow a top-of-mind presence while you showcase your skills and build their trust.

### ✓ 3. Consideration

Beyond just flirting, now two parties consider a match. Your prospect evaluates your product or services, and you work hard to gain their commitment. At this stage, ask yourself, "what information do they need to make a decision?" Identify what is holding them back and outline unique selling points or benefits.

### ✓ 4. Action

Now it's time for the big ask. Here a prospect converts and becomes a customer. At this stage, ask yourself, "what irresistible offer or personal touch can I use to tip them toward action?" Use incentives, bonus products, or hints of urgency to close the sale.

### ✓ 5. Retention

Did you know that the probability of selling to a new customer is 5-20 percent, while the chances of selling to an existing customer are estimated at 60-70 percent? Perhaps the most essential part of your funnel is convincing current customers to keep coming back! After closing the deal ask yourself, "what messages of gratitude or additional incentives can I offer? How can I invite feedback, involve current customers in an on-going conversation, or upsell the clients I already have?" The best part of a working funnel is turning one purchase into 10, then 10 sales into 100, and eventually releasing brand evangelists to tell everyone how awesome you are!

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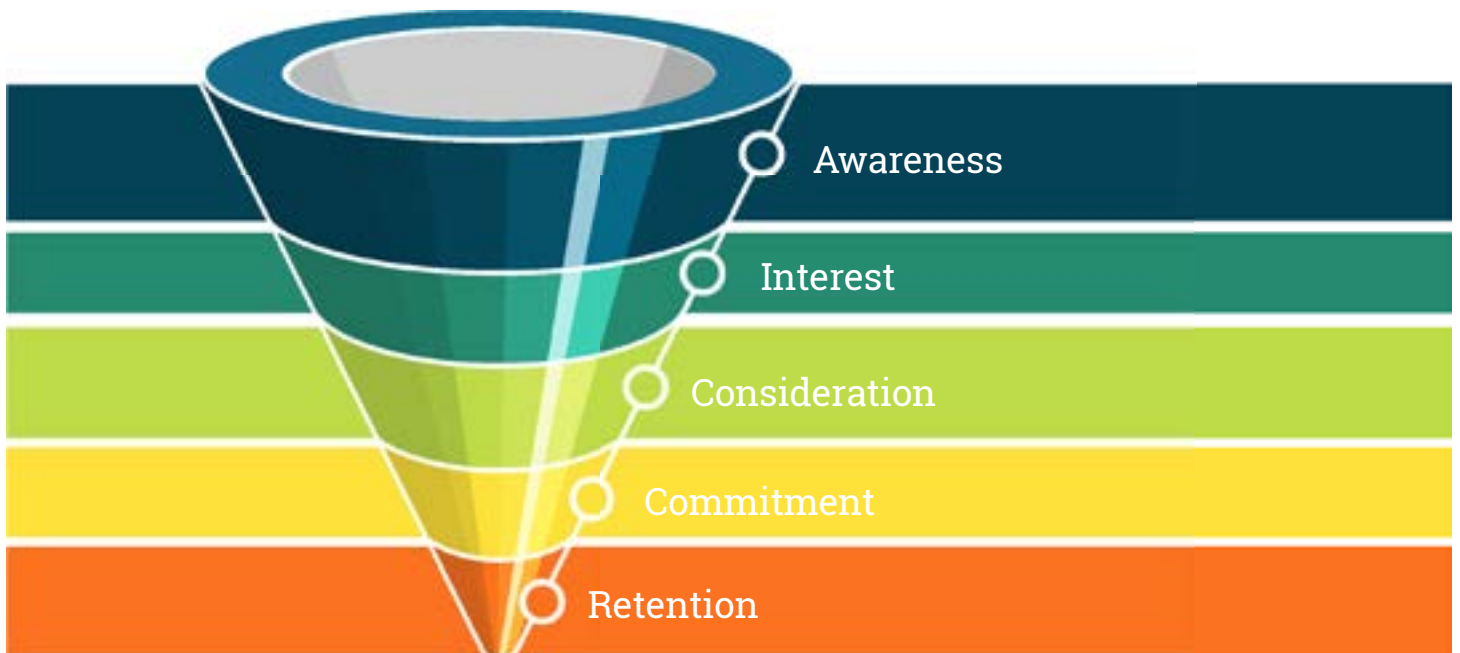
## Communication Goals for Each Stage of the Funnel

In an ideal world, people would propel themselves from casual browsing to committed buy-in. But in business you can't afford to play hard to get. It's up to YOU to offer people the right information at each stage of your relationship. Here are some tangible action steps you can take:

Communication Goal	Questions to Consider	Action Step
<b>Awareness</b> Attract Attention	<ul style="list-style-type: none"><li>• What will attract interest?</li><li>• What will drive traffic our way?</li></ul>	<ul style="list-style-type: none"><li>• Grab attention with events, referrals, billboards, or media spots</li><li>• Combine ads, direct mail, and online marketing to drum up leads</li></ul>
<b>Interest</b> Engage Leads	<ul style="list-style-type: none"><li>• What will engage prospects and build top-of-mind awareness?</li><li>• How can we establish expertise or showcase our skills?</li></ul>	<ul style="list-style-type: none"><li>• Use testimonials from existing customers</li><li>• Trade valuable coupons or free content for their contact information</li></ul>
<b>Consideration</b> Educate Prospects	<ul style="list-style-type: none"><li>• What information do they need to make a decision?</li><li>• How can we overcome their obstacles and objections?</li></ul>	<ul style="list-style-type: none"><li>• Create targeted content to feature your unique selling points</li><li>• Answer questions, use examples, and showcase real-life benefits your products bring</li></ul>
<b>Commitment</b> Create Tipping Point	<ul style="list-style-type: none"><li>• What is our irresistible offer?</li><li>• How can we bring a personal touch to tip them toward action?</li></ul>	<ul style="list-style-type: none"><li>• Increase urgency through scarcity, time-bound offers, or bonus gifts.</li><li>• Offer targeted information (like sell sheets or tailored Q/A pieces) that uniquely address their situation.</li></ul>
<b>Retention</b> Build Customer Confidence	<ul style="list-style-type: none"><li>• What messages of gratitude or surprise/ additional incentives can we offer?</li><li>• How can we invite feedback or involve customers in a two-way conversation?</li></ul>	<ul style="list-style-type: none"><li>• Upsell and resell</li><li>• Invite feedback, gather testimonials, and communicate the value you bring to existing customers.</li></ul>

## Make Your Intentions Clear

Maintaining customer relationships requires communication and lots of it! Be honest: are you intentionally communicating to people in every stage of the customer journey? Do you create targeted content that addresses the unique needs of both your “crowd” and your committed core? Set a precise communication goal for everything you publish. Define the primary reader of your piece and ask yourself, “in response to this ad/webpage/blog, what do I need my prospect to DO?” Repeatedly tell them how to take action: to call for an appointment, subscribe to your mailing list for a bonus upgrade, or to submit an e-mail contact to receive an instructional video. Make your intentions clear so the right people can swiftly respond.



Five-Stage Sales Funnel



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## A Plan and Process: Building Your Sales Funnel from Start to Finish

Ready to move from ideas to action? To build a tangible, effective sales funnel, you'll work through four basic steps:



### 1. Analyze Your Audience

Before you begin, outline your ideal customer by identifying who you can help and what challenges or interests they have. Make it easy for prospects with questions to find your answers: give people a personal invitation or offer tools that are worth their time like high-value coupons, free consultations, or online Q/A forums. Be empathetic and diligent as you build relationships because friends make some of the very best customers!

### 2. Begin with the End in Mind

To build a successful funnel, you need to start at the bottom. What is your ideal outcome? Define how many subscribers you hope to gain or how many of [BLANK] you want to sell. Quantify the goal, then work backwards to appropriately design your marketing.

Here's a micro funnel example: The Apple Blossom boutique noticed that when they sent a printed direct mail teaser about 20% of recipients visited a specific Apple Blossom URL that was created as an online landing page. Of these online visitors, 10% of visitors made a purchase or printed a coupon to use in the boutique. Using this data, Apple Blossom started at the bottom of the funnel to work backward for their marketing goals. The boutique wanted to make 100 sales for their spring promotion. If 10% of URL visitors would ultimately purchase, Apple Blossom knew they needed to bring around 1,000 people to this online landing page. If only 20% of direct mail recipients would visit them online, the boutique needed to send printed mail teasers to 5,000 individuals.

As you become more comfortable with the sales flow, you can expand opportunities to transform leads to prospects and prospects to customers. Identify the touchpoints that connect with people as they move from awareness to consideration and consideration to commitment. Touchpoints can include door hangers, paid media ads, webinars, or printed articles you feature in community publications.

No matter what you do to increase engagement, remember every funnel is built on specific, measurable data. When building a funnel, there are three reasons you need to put numbers on your marketing objectives:

- Concrete sales goals help you plan how many leads you'll target
- Numerical objectives will reveal if your funnel has any "leaks"
- Projecting your business growth rate will help you evaluate the effectiveness of your funnel

### 3. Schedule Your Content

Increasing revenue starts with the content you create. Your marketing materials are the building blocks for a solid relationship with your audience. Customer trust is not something you can force. You cultivate it little by little, story by story. As best-selling author Andrew M. Davis said, "Content builds relationships. Relationships are built on trust. Trust drives revenue."

Content will not create itself! Regularly schedule materials to appear before your prospects and diversify with brochures, print ads at their favorite hangouts, or coupons with a teaser for your landing page. Release content gradually through multiple channels like direct mail testimonials, "how to" tip sheets, blogs, or trial offers. Get people to make small commitments by entering a drawing, completing a contact form, or subscribing to a newsletter. Encourage them down the funnel by offering something valuable in exchange for their contact information or their repeat visit.

### 4. Repair and Refine

As you clarify your audience data, begin to identify "markers" that define where a customer is in their journey. From here you can A/B test your call-to-action headlines, find out which coupon codes drive more traffic to your landing page, or experiment with tipping point incentives (for example, does free shipping bring higher conversion than a 10 percent discount?). Evaluate the effectiveness of your communication, re-engage existing customers, and throw bait into new ponds. A sales funnel will always be a work in progress, so get started and tweak as you go. Soon you'll see the light of the end of the funnel as casual observers become lifelong clients!



**Meet Them Where They Are!** Flush out prospects with direct mail postcards, posters, billboards, newspaper or magazine features, referrals from friends, online reviews, Tweets, community gatherings, media publicity, branded packaging, regional partnerships, freebie gifts, trade shows or events, or publicized contests.

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"Content builds relationships. Relationships are built on trust. Trust drives revenue."

Andrew M. Davis,  
author of **Brandscaping:  
Unleashing the Power  
of Partnerships**

## The Sales Funnel Toolkit

If marketing is the engine, content is the gas! Stock your marketing toolbox full of great content to share at each stage of the customer journey. Here are some helpful options:



### Top of Funnel Marketing Tools

#### Generate Interest

- Flyers, business cards, direct mail • Banners, billboard ads and posters • Television, radio, online, and social media ads • Free video content, your own social media posts, or social proof (someone else sharing your content) • Community or industry events, media coverage or feature articles • Cold sales calls, e-mail marketing campaigns, Tweets, pop-up ads, call-to-action banners

### Middle of Funnel Marketing Tools

#### Maintain Interest



- Targeted mailings/promotions, personal invitations, door hangers • Brochures, menus, booklets, catalogs • Coupons, free samples, opt-in direct mail or online lead magnets • White papers, free downloads, educational blog posts, webinars
- Free consultations, classes, or service samplers • Call to action URL landing pages on website • Testimonials and customer reviews
- Tipping point incentives



### Bottom of Funnel Marketing Tools

#### Close Sales, Generate Loyalty

- Booklets, catalogs, postcards, inserts/invoice stuffers • Pricing guides, checklists, magnets, infographics • Calendars, personal phone calls or visits • Complimentary trials, bonus product, freebies • Aftersales service, maintenance specials, surprise rewards • Thank you notes, holiday cards, gift certificates • Service reminders, resell follow-up content, add-on purchase options

## Conclusion

Sales funnels are the backbone of your customer relationships, helping you focus on the right customers and honing these relationships for maximum potential. Using the four funnel creation steps, you can:

- Define an end-goal and set measurable objectives
- Create traffic and generate new leads
- Diversify content and woo prospects as they consider
- Retain current clients and grow existing accounts

Use the sales funnel process to clarify your message and demystify your marketing strategy. Offer people value at every stage and customers will put their trust in you with their wallets and their loyalty!



## About Your Sponsor

Sales are more than just transactions; they involve a process of decision. When customers buy from you, they express a vote of confidence in your products and your company. Show them they're in good hands with a professional splash of your brand personality! As you sharpen your image, nothing communicates confidence quite like tactile, stunning print products.

Looking to engage them at every point in their journey? As you move from creative concepts to fantastic finishes, be sure each touchpoint is one you're proud to share. We're here to make you look your best in print! From first-glance flyers to head-turning portfolio pieces, we'll resource you with compelling pieces that make your reputation shine.

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